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ABSTRACT

Designed to serve both as an activity report on Office of Management Studies (OMS) progress during 1987 and a catalog of OMS services and products, this annual report focuses on the management of technology in a scholarly environment. Programs and services are reported in five sections: (1) Applied Research and Development (the Institute on Research Libraries for Library and Information Science Faculty, the North American Collections Inventory Project, Canadian Collections Inventories Plan); (2) Academic Library Program (Leadership Development Program, Preservation Planning Program, Public Services Study, Collection Analysis Project, Organizational Screening, Planning Program for Small Academic Libraries, Academic Library Development Program, Management Review and Analysis Program); (3) Systems and Procedures Exchange Center (SPEC) (Collaborative Research Writing Program, SPEC Kits and Flyers, New Publications, Automation Inventory, Electronic Communication and Data Sharing, Professional Staff Age and Turnover Study); (4) Organizational Training and Staff Development (Basic Management Skills Institutes, Advanced Management Skills Institutes, Library Analytical Skills Institutes, Special Focus Workshops, Consultation for In-House Programs); and (5) Priorities for 1988 (Research and Development, Academic Library Program, Systems and Procedures Exchange Center, Organizational Training and Staff Development). Lists of articles and presentations by OMS staff and OMS publications are also included, as well as forms for ordering SPEC kits (individual and series subscription) and registering for 1988 institutes. (EW)

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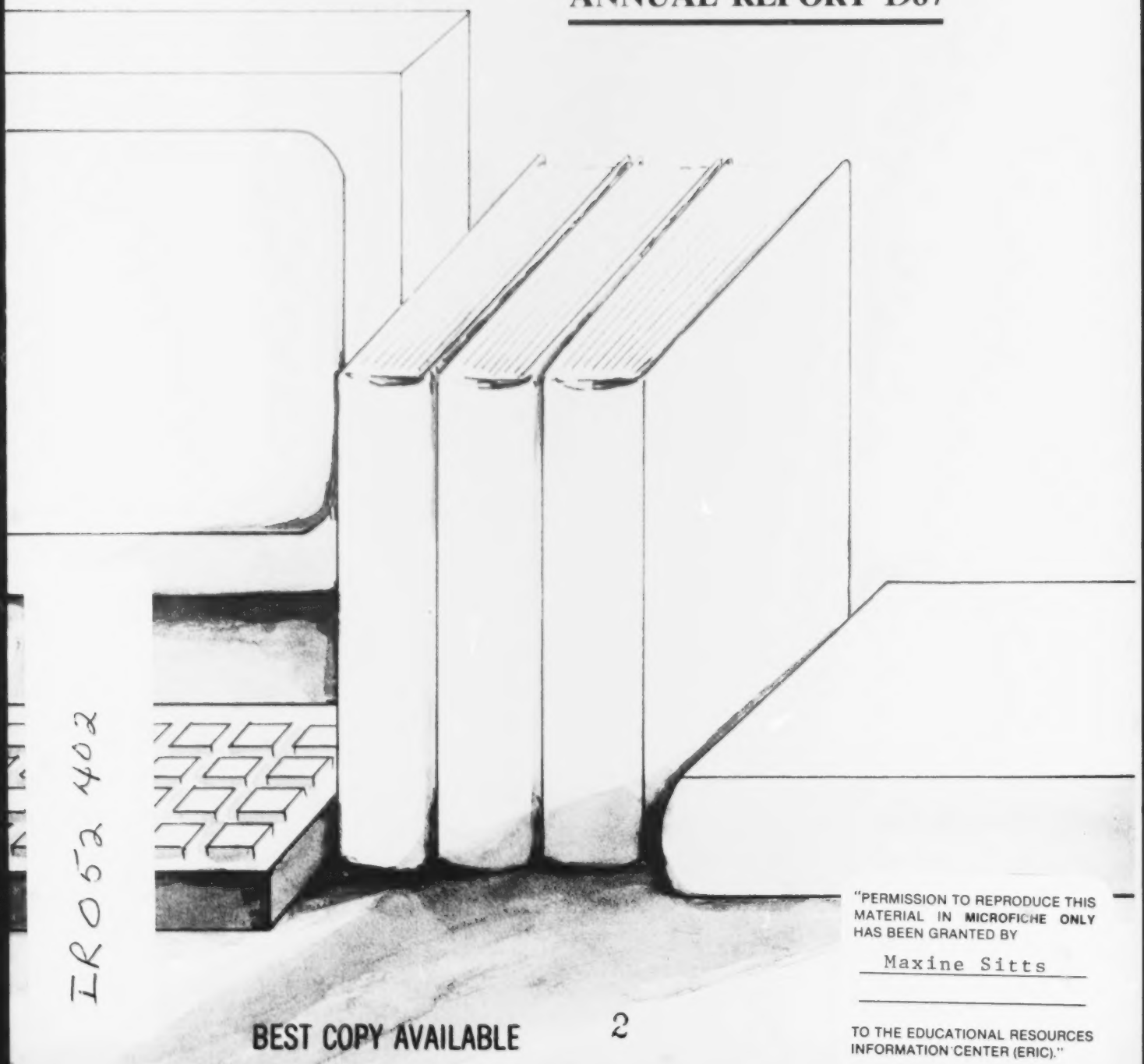
OMS

OFFICE OF MANAGEMENT STUDIES

ASSOCIATION OF RESEARCH LIBRARIES

ANNUAL REPORT 1987



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OMS

1987 ANNUAL REPORT

Duane E. Webster
Deputy Executive Director, Association of Research Libraries and Director, Office of Management Studies; and Interim Executive Director, ARL, November–December 1987

Jeffrey J. Gardner
Associate Director; and Interim Director, November–December 1987.

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Program Officer for Training

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INTRODUCTION

For academic research libraries to prosper in the scholarly information environment of the 1990s and beyond, several fundamental changes have to occur. Among these, libraries will need to redefine their vision, create new organizational and program strategies, and build a dynamic and performance-based culture for their staffs. These shifts are being driven by the information technology revolution and its effects on information, the raw material of scholarship. Access to the resources of scholarship will continue to be managed within the context of technical advances and technology-based user expectations.

Access to information is improving to the benefit of both libraries and users. Already hundreds of new sources of information and formats for the storage and retrieval of information are in the marketplace. Satellite based data sources, computer-manager models of environmental, economic, historical, and social data; and computer-manipulated indexes and concordances to literary texts are already common to researchers. Computer-output microforms as well as optical, audio, video, and magnetic disks and tapes make new and old data sources more accessible to users. Documents previously inaccessible to local users are now readily available. Data that was previously difficult to compile and sort can be assembled utilizing cheaper forms of storage and more powerful, yet more affordable data processing routines.

That the power to create, access, manipulate, and exchange information exists for individual scholars is transforming many of the academic research library's users into sophisticated information processors. And while this places pressure on the human, financial, and organizational aspects of the academic library, it also sets the stage for a very different future.

This future will include an expanded view of libraries' value to the university community. Libraries will need to redefine and broaden their vision. Well developed access and an emphasis on how information is used to solve problems is likely to replace location of information as the primary mission of the library. This will inevitably call for librarians working as members of research and teaching teams. Academic libraries will avoid becoming simply warehouses for in print materials by remaining relevant to the changing teaching and research needs of their users and by grasping the opportunities presented by technology.

New organizational and program strategies will be necessary to manage the information resources available through advanced technology. Libraries will need to establish new alliances and new ways to provide services. On-campus delivery systems for documents and information will be supplemented by advisory or consultant

responsibilities to the campus researcher. Networks, developed to expedite the processing of libraries, will expand to provide a wide range of interlibrary support services. And cooperative collection management, including preservation, will be an increasingly important part of library operations.

New performance-based cultures within academic libraries which encourage innovative and change-oriented postures among staff will develop. These new cultures will support staff in their search for fresh approaches to providing service within a dynamic environment. In this environment, the library must be viewed as a vital, interesting place to work where services are at the cutting edge of information exchange.

North American research libraries are among the largest and best managed libraries in the world. Typically, they make effective use of limited resources. Their programs are responsive to diverse constituencies, and local services are maintained with high quality bibliographic records. New information formats and means of retrieval are being rapidly introduced, and the automation of operations and services is already commonplace. The seeds of change are planted. The question never has been whether libraries will change, but rather, how much change is needed, how fast can it be introduced, and how effectively can it be managed in an academic environment. As the scholarly information environment changes and as technology is applied, the management challenges facing research libraries will continue to demand concerted attention from the leaders of the institutions.

—Duane E. Webster

THE OFFICE OF MANAGEMENT STUDIES

The Office of Management Studies (OMS) was established in 1970 to help research and academic libraries develop better ways of managing their human and material resources, and to work with libraries in determining the best way to meet their needs in a dramatically changing information age. To achieve these ends, OMS trains library managers and staff members; offers consultation and assisted self-study services; and publishes a wide range of materials on management techniques, the introduction of new technology, and staff development.

Founded with support from the Council on Library Resources, OMS has received funding from a variety of sources since 1970. These include The Association of Research Libraries, Council on Library Resources, Andrew W. Mellon Foundation, General Electric Foundation, National Endowment for the Humanities, Lilly Endowment, Inc. and H.W. Wilson Foundation. Ongoing services and publications are supported by user fees. Guidance is provided by the Association of Research Libraries' Committee on the Management of Research Library Resources and other project-related advisory groups.

Current, practical issues relating to library operations and management are the foundation of ongoing OMS activities. Collection management, preservation planning, technology application, and public services development are among the areas where OMS has developed special expertise to assist libraries in maintaining their roles as information centers and as preservers of their nations' heritage.

ARL COMMITTEE ON THE MANAGEMENT OF RESEARCH LIBRARY RESOURCES, 1987

Sul H. Lee (CHAIR), Dean, University Libraries, University of Oklahoma (1987-89)

Ellen Hoffman, Director, York University (Term ended 1987)

Philip E. Leinbach, Librarian, Tulane University (1986-1988)

Jay K. Lucker, Library Director, Massachusetts Institute of Technology (Term ended 1987)

Susan Martin, Librarian, Johns Hopkins University (Term ended 1987)

Carlton C. Rochell, Dean, University Libraries, New York University (1986-1988)

Maureen Pastine, Director, Washington State University Library (1987-1989)

Thomas W. Shaughnessy (ex officio as Chair of Committee on ARL Statistics) Director, University of Missouri Library

Peter Spyers-Duran, Director, Wayne State University Libraries (1987-1989)

Joining the Committee at the End of 1987

John Black, Chief Librarian, University of Guelph Library (1988-1990)

Sheila Creth, Director, University of Iowa Libraries (1988-1990)

ARL COMMITTEE ON THE MANAGEMENT OF RESEARCH LIBRARY RESOURCES

The Association of Research Libraries' Committee on the Management of Research Library Resources oversees the planning and implementation of personnel, staffing and management directives of the ARL Plan of Action. It coordinates ARL's efforts to enhance the analytical capabilities of member libraries seeking effective resource management. The Chair of the Committee on ARL Statistics serves as an ex-officio member of the committee. In particular, the Committee on Management:

- monitors research in management-related areas and identifies problems, issues, and opportunities facing research libraries that should be addressed through the application of management methods and/or quantitative analyses, and makes recommendations to the ARL Board on policies, programs and positions;
- relates the work of ARL standing committees and task forces in the areas of statistical information and organizational and staff development to the overall needs in management, and keeps the committees and task forces informed of each other's work;
- oversees and advises on the work of the ARL Office of Management Studies; specifically assists in the development of management programs and activities to meet the needs of ARL member libraries, and in securing the financial resources needed to support these activities; assesses OMS performance in achieving its goals and the effectiveness of its programs; and recommends OMS policy and program priorities to the ARL Board;
- coordinates, where appropriate, ARL's work in the area of management with that of other national organizations and ensures, with the approval of the Board, that necessary liaisons between these organizations and ARL standing committees are in place.

SUMMARY OF ACTIVITIES IN 1987

During 1987, the Office of Management Studies was fully staffed and programs operated at a high level. The following is a brief summary of the highlights of OMS activities for the year.

Applied Research and Development

- OMS received a $45,000 grant from the Council on Library Resources to conduct a third Institute on Research Libraries for Library and Information Science Faculty. Twelve faculty will participate in the Institute which will be held in the Summer of 1988.
- Throughout the year, numerous new Conspectus materials and resources were released through the North American Collections Inventory Project, including more than a dozen revisions, guidelines and worksheets.
- Revision of the Manual for the North American Inventory of Research Library Collections was begun this year, reflecting the experience of project participants since it was first issued in 1985.
- The Council on Library Resources approved a $3,000 grant for the modification of worksheets and supplemental guidelines for the Conspectus. Librarians at several libraries produced the modifications and the grant helped defray the libraries' costs related to their work.

Academic Library Program

- During the year, 23 self-studies were underway in libraries in the United States and Canada, including nine Leadership Development Programs, five Public Services Studies, and three Preservation Planning Programs.
- Expanded and updated versions of the Preservation Planning Program Manual and Resource Notebook were issued this year with support from the National Endowment for the Humanities (NEH).
- The tenth and final NEH demonstration site, Iowa State University, issued its Preservation Planning Program Report.

Systems and Procedures Exchange Center

- OMS laid additional groundwork this year for its information clearinghouse to offer electronic alternatives to traditional print-oriented information services. As part of its efforts, the Automation Inventory was refined and the third report was issued in October.
- The center handled an average of 20 queries per month; served as liaison for 68 ARL members on ALANET, the electronic mail network, and completed two on-demand surveys. SPEC also conducted three mail and three phone surveys., and cooperated in other surveys with the Office of Scholarly Communication, the UCLA Graduate School of Library Science, and ARL's Preservation and Management Committees.

Training and Staff Development

- The training staff conducted seven public and six sponsored management institutes this year. Eleven special focus workshops and presentations were completed and a new program, "Managing the Learning Process" was initiated. Nearly 800 library staff participated in OMS training programs throughout 1987.
- A new series, Organizational Effectiveness Workshops, was inaugurated in 1987 for ARL member libraries, and two series were held. This series is designed for a specific library situation with the overall goal of enhancing organizational skills among professional and support staff.

Additional OMS Activities

The OMS staff worked with five ARL committees and task forces year round, contributing to the design and conduct of the Fall ARL membership meeting, and assisting in the updating of the ARL Strategic Plan.

In the Fall, OMS Director and ARL Deputy Executive Director, Duane E. Webster, assumed the role of Interim Executive Director of the Association of Research Libraries. OMS Associate Director Jeffrey J. Gardner assumed the role of OMS Interim Director.

APPLIED RESEARCH AND DEVELOPMENT

With the advice and support of the ARL Committee on Management the OMS participates in selected separately-funded projects, develops new programs to benefit ARL members, and assists research projects operated by other agencies and libraries. In 1987, OMS was actively involved in the following research and development activities:

Training Program for Preservation Administrators:
With the encouragement of the National Endowment for the Humanities, a proposal for helping research libraries establish a preservation program was prepared by OMS staff, and approved by the ARL Board. A final version of this proposal was submitted to NEH in December. The initial program would fund the consultant skills training of five preservation specialists, as well as the conduct of the Preservation Planning Program in another ten ARL member libraries.

Managing Technology Transition in Research Libraries:
Upon the advice of the ARL Committee on Management of Research Library Resources, OMS staff developed a proposal on designing a technical services program to address the need to manage technology transition more effectively. The one- year project would develop resources and tools to assist academic libraries in improving technical services operations.

Tufts Data-Sharing Project:
A data-sharing test was conducted with Tufts University during 1987. The project's goal was to identify the most useful trend indicators, peer comparisons, and other management ratios that can be derived from available information on library and institutional characteristics. The project has produced two reports solely for its 25 participants, the most recent including 1986-87 ARL and HEGIS data.

Financial Management Skills Institute:
Plans are underway on the design of a financial management skills institute to be held in 1988. This institute will examine skills related to managerial accounting, fiscal control, budgeting, reallocation, cost analysis, and developing accountability.

Research libraries must be willing and able to devote a portion of their resources to research and development if they are to have any hope of maintaining central academic roles in their institutions Providing effective access to an ever expanding universe of information which is stored or distributed in a myriad of formats is both an exciting and daunting challenge, with the constant search for innovation being the norm in our environments. Continued investment in staff development through participation in ongoing research and development is a critical part of this process.

—John B. Black, Chief Librarian,
University of Guelph Library

Management Information Service:
OMS staff is examining the possibility of establishing a process for libraries to use in examining critical issues by gathering data on operations and then applying that data to management decision-making. The service would provide assistance in targeting issues, designing data gathering methodologies, establishing normative benchmarks, analyzing information, and determining appropriate action.

Study of Professional Staff Turnover in Research Libraries:
In response to the ARL Committee on Management of Research Library Resources' desire to improve understanding of the demographic characteristics of research library staff, a study of professional staff turnover was conducted in 1987. A preliminary report on survey results was mailed to all directors, and a final report will be published early in 1988.

INSTITUTE ON RESEARCH LIBRARIES FOR LIBRARY AND INFORMATION SCIENCE FACULTY

Following upon the successful completion of two previous institutes, the Council on Library Resources announced in July, 1987 the award of a grant to ARL to conduct a third Institute on Research Libraries for Library and Information Science Faculty. The Summer 1988 institute will continue and expand upon a major goal of strengthening relationships and understanding among research library staff and the teaching faculty in library schools.

The CLR grant of $45,000 will support the conduct of a two-week series of seminars, discussions and briefings in research libraries for 12 faculty. The institute will be hosted jointly by the University of Chicago Library and the University of Chicago Graduate Library School. An advisory committee has been established to work with the OMS staff to design the institute, recruit and select participants, identify seminar leaders, and evaluate the institute.

Noteworthy in the conduct of the third institute is the co-sponsorship provided by the Association of Library and Information Science Educators and the Association of College and Research Libraries. Both associations are providing representatives to the advisory committee and are helping to promote participation.

There are four components to the institute: field visits, seminars and discussions, a resource notebook, and case studies. During the first week, participants attend seminars led by university administrators, scholars, research library directors and research librarians. Topics for discussion include allocation of collection management funds, attraction and management of funds in periods of decline and growth, policy development and collection assessment, the interdependent roles of faculty and librarians in collections, cooperative collection arrangements and preservation.

During the second week, participants attend briefing sessions designed to integrate the field visits and seminars and to focus on the problems and opportunities facing academic and research libraries. Structured field visits provide participants with a chance to explore issues and current on-the-job situations faced by research librarians in the area of collection management. In advance of the seminar sessions, each participant completes a two-to five-day field visit to a research library. OMS provides guidelines for conducting the field visit and assistance in selecting and arranging access to research libraries.

In addition, senior managers at libraries brief participants on collection management issues within their organizations. These discussions serve to provide insights into the diversity of research library practices, as well as to broaden the information base gained through the field visits and seminars.

These institutes are one approach OMS has provided to create a forum for a meaningful exchange between library administrators and library educators. They provide an opportunity for the mutual exploration of the dynamic quality of academic research libraries today and the implications of their changing nature for library education.

To date, 22 library and information science faculty have participated in these institutes. Based on their responses, the program can be regarded as successful in meeting its objectives of examining and exploring the emerging role and requirements of research libraries as a means of changing and improving the way individuals are prepared for careers in research librarianship.

ADVISORY COMMITTEE, INSTITUTE ON RESEARCH LIBRARIES FOR LIBRARY AND INFORMATION SCIENCE FACULTY, 1987-1988

Joseph A. Boisse
Librarian
University of California, Santa Barbara

Charles Churchwell
Visiting Professor of Library Science
Wayne State University

Kathleen Heim
Dean
Louisiana State University, School of Library and Information Science

Ruth Person
Dean
Clarion University of Pennsylvania, College of Library Science

Martin D. Runkle
Director
University of Chicago Library

Robert D. Stueart
Dean
Simmons College, Graduate School of Library and Information Science

Thomas W. Shaughnessy
Director
University of Missouri Library

NORTH AMERICAN COLLECTIONS INVENTORY PROJECT

For the past four years, OMS has worked with the Research Libraries Group (RLG) to expand its Conspectus program into an inventory of North American Research Library Collections. The long-term vision behind this project focuses on its potential to provide the information libraries need to make substantive cooperative decisions regarding collection development, preservation and cataloging. As such, the inventory establishes a standard framework for libraries to use in describing their collections, and enhances opportunities to develop cooperative programs that will allow libraries to serve their users more effectively.

Full-scale implementation of NCIP was made possible by a $220,000 grant from the Andrew W. Mellon Foundation in June 1985. The three-year grant supported the selection and preparation of 15 librarians as NCIP trainers; development of a materials distribution center; and the support system needed to coordinate ARL member pariticpation. By the end of the grant period, the online inventory of North American research library collections will include data from many ARL libraries and will provide a foundation for inter-institutional cooperation in acquiring, preserving and providing access to research materials.

OMS staff have developed procedures and resources to support use of the RLG Conspectus and have utilized them in over 40 ARL member libraries. Efforts have been concentrated on building a data base that provides information on the location of specific subject collections, their relative strengths and coverage. Managed by RLG, this database is available in both online and print formats. During 1987, training was provided to several ARL libraries and groups of libraries by project staff and NCIP trainers drawn from the group of collection development staff trained by OMS for that role.

Interest in the Conspectus methodology among European libraries led to two workshops for the French Ministry of Education. Whether the goal of a European Conspectus database will be accomplished is still in question, but it is evident that the Conspectus approach offers European research libraries a powerful tool for assessing and describing their collections and can serve as a means toward greater coordination in collection management.

During 1987, numerous new Conspectus materials and resources were released through NCIP, including:

— a revised version of the Mathematics Conspectus
— supplemental Guidelines for Mathematics
— supplemental Guidelines for French Language
— supplemental Guidelines for Literature
— revised Art and Architecture Conspectus Worksheets
— supplemental Guidelines for Art and Architecture
— verification studies for Chemistry - VS03
— verification studies for Genetics - VS06
— verification studies for Zola - VS11
— verification study for English-Candadian Literature Post 1914

As was the case with the original development of the Conspectus, the revisions are being undertaken on a volunteer basis by collection development librarians from a number of research libraries.

Other Activities and Developments

- Over 50 collection development librarians participated in the first meeting of an NCIP Users Group during ALA in Chicago. The meeting was a forum for sharing information on project plans, concerns of current participants, and approaches to completing and utilizing the Conspectus. Another NCIP Users' Group meeting was held during ALA in San Francisco and included presentations on Conspectus implementation in the University of California Libraries, the Harvard University Libraries, the University of Alberta Library and a group of libraries in Georgia. A third Users' Group meeting was planned for the ALA Midwinter in January, 1988.
- Revision of *The Manual for the North American Inventory of Research Library Collections* was begun this year, reflecting the experience of project participants since it was first issued in 1985.
- The Council on Library Resources approved a $3,000 grant for the modification of worksheets and supplemental guidelines for the Conspectus. Librarians at several libraries will produce the modifications and the grant will help defray the libraries' costs related to their work.
- Over 80 percent of ARL libraries participate in NCIP and, because of their strong interest in using personal computers to input and access local collection assessments, a collection data system is being developed for the IBM PC-XT. This database will allow libraries to record Conspectus collection values and language codes on personal computers. It will also facilitate more effective local use and speed up input into the Conspectus On-line. OMS worked with staff at the University of North Carolina to develop the needed software. Designed by John Turbfill at UNC, the PC program uses dBase III Plus and is modelled on the RLG Conspectus On-line, but with

several important new features. Enhancements include the addition of columns for local use, such as the subject selector, academic discipline and cooperative collection reliance. It is expected that the system will be distributed by OMS in 1988.

Canadian Collection Inventories Plan

OMS worked with the National Library of Canada in adapting Conspectus materials for Canadian applications. Inventories of general collections were begun using RLG Conspectus methodology adopted by ARL for NCIP. This year, the National Library of Canada developed a Canadian Conspectus Search Service which is now available online to Canadian librarians. While modelled on RLG's Conspectus On-line, it has several important differences; a fully bilingual capability; Boolean search capability in the notes fields; and simplified searching on LC classification numbers. It became fully operational this year.

When completed, Conspectus data for Canadian libraries will reside in a Canadian inventory of research collections. This database, developed by the National Library, will be available nationwide in both official languages. Of the 29 members of the Canadian Association of Research Libraries (CARL), 14 belong to ARL as well, and are participating in NCIP.

NCIP PROJECT CONSULTANTS

Five librarians who have contributed to the development of NCIP also serve as project consultants and have worked with OMS staff on NCIP workshops. They are:

Joseph Branin
Director
Humanities and Social Sciences Libraries
University of Minnesota Libraries

John Clouston
Assistant University Librarian for Collection Development
University of Western Ontario

David Farrell
Associate Dean of Libraries for Collection Management
Indiana University

George Soete
Associate University Librarian
University of California, San Diego

Patricia Yocum
Head
Natural Science Library
University of Michigan

NCIP CONSULTANTS

Ross Atkinson
Assistant University Librarian for Collection Development
University of Iowa Libraries

Stella Bentley
Assistant Director
Case Western Reserve University Libraries

Anthony W. Ferguson
Assistant University Librarian for Collection Development
Columbia University

Charles S. Fineman
Humanities Bibliographer
Northwestern University Library

M. Pierre Gaudette
Adjoint au Directeur
Universite de Sherbrooke

Lelde B. Gilman
Head, Collection Development
Biomedical Library
University of California, Los Angeles

Joan Grant
Director of Collection Management and Consortial Services
New York University Library

Deborah L. Jakubs
General Bibliographer
Duke University

Leslie LaFleur
Education Library
University of Alberta Library

Annette Melville
Research Libraries Group

Marcia J. Pankake
Bibliographer
English and American Literature
Wilson Library
University of Minnesota

Anna H. Perrault
Humanities Bibliographer
Middleton Library
Louisiana State University

Assunta Pisani
Administrative Head
Collection Development Department
Harvard College Library

Joel S. Rutstein
Assistant Director for Collection Services
Colorado State University Libraries

Mary Jane Starr
Special Assistant to the Associate National Librarian
National Library of Canada

ACADEMIC LIBRARY PROGRAM

For over 17 years, OMS has provided libraries with programs to systematically study their internal operations and develop workable plans for improvement. With the assistance of trained consultants, libraries use tested methodologies to conduct assisted self-studies. The OMS provides onsite and telephone consultation, staff training, manuals and other materials to aid participants in gathering and analyzing information. These self studies take from three to twelve months to complete, with groups of library staff meeting three to four hours a week. Individuals spend additional hours studying, gathering data and analyzing their findings. In this way, participating libraries gain insight into their current situation and develop sound programs for change and improvement.

Such assessments have contributed to periodic accreditation efforts, parent institutions' planning processes, the introduction of new services and the resolution of complex organization problems. Libraries often use their final reports to gain support for library needs and to highlight their role in the future of the college or university. Self-studies also improve the analytical and problem-solving skills of staff and build staff motivation. Faculty-library relations are often improved as well because the studies clarify interests, perceptions and expectations.

During 1987, 23 self-studies within the Academic Library Program were underway in libraries in the United States and Canada. A brief description of each type of self-study is listed below, followed by the names of institutions participating in each program.

Technical services is a critical aspect of academic library operations ripe for review, given the momentous changes of the past two decades. Libraries need to review and revise their technical services administrative and personnel structures to reflect the roles of acquisitions and cataloging in present and future environments.

—Jay K. Lucker, Director of Libraries,
Massachusetts Institute of Technology

LEADERSHIP DEVELOPMENT PROGRAM

This program is an exercise in strategic planning geared to senior management staff of large research libraries. Just one year old, the program has been met with heavy response. It provides opportunities to examine options for future development and to examine making changes. During a three and one-half day retreat, participants consider library alternatives and strategies; evaluate ways to deliver services more effectively given available resources; and discuss possible adjustments in service philosophy and staff values. To date, the program has been offered only to members of the Association of Research Libraries.

MASSACHUSETTS INSTITUTE OF TECHNOLOGY
NATIONAL AGRICULTURAL LIBRARY
OHIO STATE UNIVERSITY
STATE UNIVERSITY OF NEW YORK, BUFFALO
UNIVERSITY OF CHICAGO
UNIVERSITY OF IOWA
UNIVERSITY OF SOUTHERN CALIFORNIA
UNIVERSITY OF TORONTO
YALE UNIVERSITY

PRESERVATION PLANNING PROGRAM

Geared to large and mid-sized academic and research institutions, this program helps libraries identify their current preservation activities and set priorities as part of a comprehensive long-range planning effort. Participants also have an opportunity to assess the potential impact of emerging national developments on their internal programs.

In 1984, ten libraries were selected to participate in the Preservation Planning Program (PPP) as part of a two-year demonstration project funded by a $65,375 grant from the National Endowment for the Humanities. In 1987, the tenth library—Iowa State University—completed its study and issued a final report which is available from OMS. In addition to the NEH-sponsored demonstration sites, another six libraries also have conducted the PPP. (See List of OMS Publications.)

Major resources for conduct of the PPP are its manual and accompanying resource notebook. The manual was designed in 1982 as a foundation for library preservation planning programs, with or without consultation assistance. The accompanying resource notebook contains important, often difficult-to-acquire documents and extensive annotated bibliographies.

Supported in part from a supplemental grant from NEH, the OMS in 1987 designed two new modules for the PPP manual and extensively

updated the resource notebook. The two new areas of interest in the manual are: "Staff and User Education" and "Interinstitutional Cooperation." The new 700-plus page resource notebook provides articles, procedures, techniques and readings indexed and arranged to assist librarians in learning about and conducting preservation programs.

Both publications are available from OMS for use by all libraries, not just those receiving consultation assistance. In addition, OMS continues to accept applications from libraries wishing consultation services for the PPP.

Center for Research Libraries
Colorado State University
Dartmouth College
IOWA STATE UNIVERSITY
National Library of Medicine
Northwestern University
Ohio State University
Smithsonian Institution
State University of New York, Stony Brook
University of Missouri
University of Oregon
UNIVERSITY OF PITTSBURGH
University of Tennessee
University of Virginia
University of Washington
UNIVERSITY OF WISCONSIN

PUBLIC SERVICES STUDY

This program, developed in 1984, provides a framework for short or long-term strategic planning of public services. In the context of emerging technologies and changing user needs, it focuses on describing and inventorying services; assessing user needs and services performance; examining organization, staffing and management of services; planning for and using new technology; developing facilities requirements; and articulating a public services program. It has been designed for large and mid-sized research and academic libraries.

BOSTON UNIVERSITY
Brown University
Columbia University
DARTMOUTH COLLEGE
MCGILL UNIVERSITY
Michigan State University
Newberry Library
University of California, Berkeley

*An asterik signifies non-ARL members.
CAPITAL letters signify participants during 1987.

UNIVERSITY OF CALIFORNIA, SANTA BARBARA
University of Houston
University of North Carolina
UNIVERSITY OF PITTSBURGH
Temple University
YORK UNIVERSITY

COLLECTION ANALYSIS PROJECT

This program provides a framework for assessing collection development practices and policies. It includes modules on collection history and description; collection objectives and policies; funding allocations for materials; organization and staffing of collection development functions; collection assessment; and preservation and resource sharing. Both large research libraries and academic libraries with smaller collections can benefit from participation in this program.

Arizona State University
Brigham Young University
Case Western Reserve University
*Catholic University
Cornell University
Duke University
*Franklin & Marshall College
*George Washington University
Georgetown University
*Georgetown Law Library
Howard University
Massachusetts Institute of Technology
McGill University
*Oregon State University
RUTGERS UNIVERSITY
University of Alberta
University of British Columbia
University of California, Berkeley
University of California, San Diego
University of Colorado
*University of the District of Columbia
University of Houston
*University of Illinois, Chicago
University of Illinois, Urbana
University of Maryland
University of Michigan
*UNIVERSITY OF NORTHERN IOWA
University of Notre Dame
*University of Wyoming
Vanderbilt University
*Widener University

ORGANIZATIONAL SCREENING

Intensive and active, this program centers around a specific issue such as reorganization design, team-building or planning. It can be used by any size library.

*Brandeis University
Dartmouth College
Johns Hopkins University
National Library of Canada
*North Texas State University
*Northeastern University
*San Francisco State University
*San Jose State University
Syracuse University
Temple University

PLANNING PROGRAM FOR SMALL ACADEMIC LIBRARIES

This program, designed specifically for small libraries with staffs of less than 20, assists in the development of plans for instruction and research services. Participants examine policies, library user needs, service delivery and management.

*Butler University
*Carlton College
*DePauw University
*Earlham College
*Franklin College
*Gannon University
*Goshen College
*Hanover College
*Hope College
*Huntington College
*Illinois Wesleyan
*Lake Forest College
*Manchester College
*North Park College
*Saint Olaf College

*An asterik signifies non-ARL members.
CAPITAL letters signify participants during 1987.

*Saint Joseph's College
*Saint Mary's College
*Saint Xavier College
*Taylor University
*Transylvania University
*University of Evansville
*Valparaiso University
*Wittenburg University

ACADEMIC LIBRARY DEVELOPMENT PROGRAM

This program provides a comprehensive review of all aspects of library operations, and includes sections on services, management practices, facilities and changing technological needs. It has been designed for mid-sized libraries with staffs of 20 to 50.

*BLOOMSBURG UNIVERSITY
*California State University
*Drew University
University of Miami
*NEW MEXICO STATE UNIVERSITY
*Northeastern University
*Seattle University
*Southeast Missouri State University
UNIVERSITY OF CALIFORNIA/IRVINE
*University of North Carolina
*University of the Pacific
University of Southern California
*University of Tulsa
*University of Wisconsin, Parkside

MANAGEMENT REVIEW AND ANALYSIS PROGRAM

This program covers planning, budgeting, policy making, management information, supervision and leadership, organization, personnel practices, staff development and executive leadership. It is offered to libraries with 50 or more staff members.

*Ball State University
Boston University
Case Western Reserve University
Indiana University
Johns Hopkins University
*Mankato State University
National Oceanic and Atmospheric Administration
Pennsylvania State University
Rutgers University
Smithsonian Institution
*Southern Illinois University, Edwardsville
University of California, Los Angeles
University of Connecticut
University of Kentucky
University of Maryland
University of Massachusetts
University of Rochester
University of Tennessee
University of Toronto
University of Utah
University of Washington
Washington State University

*An asterik signifies non-ARL members.
CAPITAL letters signify participants during 1987.

SYSTEMS AND PROCEDURES EXCHANGE CENTER

The Systems and Procedures Exchange Center (SPEC) was established in 1973 to systematically gather, analyze and distribute information and descriptive materials on contemporary management techniques as they are developed by academic libraries. Several times each year, the center conducts surveys for information and collects numerous documents on topics of current interest. These documents include manuals, policy statements, planning materials, committee reports, job descriptions, procedures, brochures, user studies and results, as well as newsletters and descriptions of innovative techniques. From this collection, materials are selected for presentation in SPEC kits which are issued ten times each year. The center also maintains a SPEC index which is updated quarterly.

In addition, the center responds to several hundred information inquiries each year, including file searches, individual surveys and research, and quick-reference telephone queries from ARL members. During 1987, the center handled an average of 20 queries per month; served as liaison for 68 ARL members on ALANET, an electronic mail network, and completed two on-demand surveys. SPEC also conducted three mail and three phone surveys, all targeted to specific sub-groups of members, and cooperated in six other surveys with the Office of Scholarly Communication, the UCLA Graduate School of Library Science, and ARL's Preservation and Management Committees.

On a regular basis, the SPEC coordinator and other OMS staff members identify topics to be investigated during library site visits, interview library administrators and staff to determine information needs, and familiarize members with ways to use SPEC materials and services. The center also publishes analytical reviews on management topics, identifies areas of library management expertise, and facilitates the exchange of information in an effort to promote experimentation and innovation based on successful programs at member libraries. In this way, academic, special and public libraries benefit from activities and research done at ARL institutions.

To control our own future in the technological revolution, research librarians must have up-to-the-minute information on peer institution practices and plans, along with timely analyses of current trends and issues.

—Philip Leinbach, Librarian, Tulane University

COLLABORATIVE RESEARCH WRITING PROGRAM (CRW)

This program enables selected librarians to work with OMS staff in joint research and writing activities leading to authorship of publications which are part of an ongoing OMS library management series. Up to 15 librarians who are specialists in various areas of the profession are invited to participate each year. Participants receive guidance and support in the following areas:

- Survey and research techniques
- Writing and editing skills
- Enrichment of understanding of a current academic concern from a management perspective
- Production of a publication

Throughout a CRW project, which operates over a five- to six-month time frame, a librarian works at his or her home library, collaborating regularly with OMS staff. A project can involve several activities, depending on the topic, including survey design and administration; phone and in-person interviews at libraries; literature research; and investigation of OMS resources. The project culminates in either a SPEC kit and flyer, or a more in-depth review (an occasional paper) that suggests alternative approaches to dealing with issues.

COLLABORATIVE RESEARCH WRITING PROGRAM PARTICIPANTS 1987

Participant	Topic
William K. Black, Assistant Director for Administrative Services and Personnel, Iowa State University	Job Analysis
James E. Bobick, Associate Director, University Libraries, Case Western Reserve University	Collection Development Organization and Staffing
Robert Burns, Jr., Assistant Director, Colorado State University	Planning for Management Statistics
Sharon E. Clark, Associate Professor of Library Administration, University of Illinois, Urbana-Champaign	Managing Copy Cataloging
Kenneth D. Crews, Member of California Bar and Ph.D. Student in UCLA Graduate School of Library and Information Science	University Copyright Policies
Kathleen Gorman, Assistant to the University Librarian, University of Minnesota	Performance Evaluation in Reference Services
Ralph Holibaugh, Associate University Librarian, Rice University	Optical Discs for Storage and Access
Anne J. Price, Staff Associate, Office of Scholarly Communication, American Council of Learned Societies	Library-Scholar Communication
Carol Turner, University of Florida, and Ann Latta, Stanford University	Access to Government Documents
Barbara von Wahlde, Director of Libraries, State University of New York at Buffalo	Retrospective Conversion

SPEC KITS AND FLYERS

SPEC kits are collections of selected library documents concerning specific areas of library management. They are prepared by OMS staff and collaborative research writers—working librarians selected for their experience and knowledge. Criteria for inclusion of documents are relevance to management or administrative perspectives; timeliness; usefulness to other libraries; direct relationship to the area of concern; and distinctiveness. Designed to illustrate alternatives and innovative solutions, the kits describe both the administrative and operational aspects of a particular issue. Each kit also includes a selected reading list.

A two-page SPEC flyer introduces each kit. Flyers are based on survey results, materials submitted by ARL libraries, a review of current literature, and information obtained during interviews. The flyers focus on emerging trends and innovations in academic and research library management and operation. Designed to provide a quick picture of activities and developments, the flyers give perspective to the content of SPEC kits.

Originally provided only to ARL members, SPEC kits and flyers are now sent to an additional 350 library subscribers. Although the majority of these libraries are associated with universities or colleges, about 25 percent are public or special libraries. SPEC kits and flyers are available through library distributors, or directly from OMS.

The following is a list of kits published in 1987. Back issues are available from OMS.

SPEC ACTIVITIES, 1987

	IN-DEPTH INFO REQUESTS	SPEC KITS DISTRIBUTED non-subscription	OMS PUBLICATIONS DISTRIBUTED	SUBSCRIPTIONS MAINTAINED	GENERAL INFO REQUESTS
JANUARY	25	85	57	422	43
FEBRUARY	30	146	125	435	54
MARCH	22	189	86	450	NA
APRIL	16	91	124	459	NA
MAY	20	140	91	464	53
JUNE	27	106	96	469	64
JULY	10	152	104	473	76
AUGUST	2	95	121	476	62
SEPTEMBER	5	99	156	470	65
OCTOBER	10	110	55	465	102
NOVEMBER	12	116	101	474	49
DECEMBER	15	88	91	475	63
TOTALS	194	1417	1207	(average) 458	631

SPEC Kits and Flyers, 1987

PERFORMANCE EVALUATION IN REFERENCE SERVICES (#139). In a 1986 survey, an overwhelming majority of ARL members indicated they collected data on reference services. Further research shows that measuring performance at the reference desk is the most controversial aspect of evaluation, and that instructional services are the only activities where qualitative data are collected as frequently as quantitative data. The kit includes library policies and standards related to overall reference services; evaluation procedures and forms for reference desk service, database search services, and instructional services: plus a selected reading list. November-December 1987.

UNIVERSITY COPYRIGHT POLICIES (#138). This kit approaches copyright use and ownership policies from the viewpoint of university administrations as well as libraries. The focus is on entire policies. The flyer discusses use and ownership policies, and approaches to developing university policies. The kit includes brochures; comprehensive copyright policies; specific policies for performance/display, software, and music; two general ownership policies; and ownership policies for computer software and university-sponsored educational materials. This Kit supplements SPEC Kit #102. October 1987.

PRESERVATION GUIDELINES (#137). This kit completely updates the 1981 version on Basic Preservation Procedures. It draws upon materials created by libraries, often cooperatively, over the past six years. Decision-making, brittle books, and future trends are discussed in the flyer. September 1987.

MANAGING COPY CATALOGING (#136). The promise of cost savings through shared cataloging keeps libraries interested in how to increase effectiveness. To gather information on current practices, the researcher sent a questionnaire to 19 ARL libraries in August 1986 and found that the design of overall copy cataloging workflow seems to vary not according to the size of collections or the volume of acquisitions, but rather according to the way libraries define copy. 119 pages. July-August 1987.

JOB ANALYSIS (#135). Libraries are analyzing traditional job classifications and positions in order to make the best use of staff and improve overall performance. The process of job analysis can serve as an effective method of organizing staff positions. The Kit contains survey results, five examples of information-gathering, 10 programs descriptions, and a selected bibliography. 95 pages. June 1987.

PLANNING FOR MANAGEMENT STATISTICS (#134). Data collection and analysis supports decision-making and planning. This requires an understanding of how to work with statistics and how to determine which combinations of data are valid for specific purposes. A SPEC survey investigating uses of statistics was answered by 91 libraries. The Kit contains tabulated survey results, five definitions and guidelines, five planning reports, and a selected reading list. 106 pages. May 1987.

OPTICAL DISCS FOR STORAGE AND ACCESS (#133). In pursuing projects which incorporate optical disc technology, several research libraries are moving toward integrating optical disc storage into new levels of service. The flyer discusses technical considerations, management issues, impact on service to users, and trends of incorporating this new technology. The Kit contains planning documents, proposals, descriptions of demonstration projects, progress reports, and a selected reading list. 111 pages. April 1987.

LIBRARY-SCHOLAR COMMUNICATION (#132). New information formats have increased the need for better communication between libraries and scholars. The Flyer describes humanities scholars' views from a survey by an Office of Scholarly Communication. The Kit includes a report on the OSC survey and examples of ARL member communication efforts including staff responsibilities, library-wide programs, and publications. 114 pages. March 1987.

COLLECTION DEVELOPMENT ORGANIZATION AND STAFFING (#131). As collection management tasks become more complex, libraries are changing the organization and staffing of these functions. The use of part-time selectors has involved more staff in building collections. Libraries are recognizing the need to study the costs, activities, and performance standards related to collection management. Kit sections cover organization, position descriptions, orientation and training, and three studies. 121 pages. February 1987.

RETROSPECTIVE CONVERSION (#130). In the past 10 years there has been a shift from reclassification in order to standardize access to specific collections, to recon as a crucial step toward implementing online catalogs and sharing in nationwide databases. The kit includes survey results, planning documents, and a bibliography. 113 pages. January 1987.

NEW PUBLICATIONS

Occasional papers are often the result of in-depth investigation and analysis of the issues covered in SPEC kits, focusing on current practices and proposing alternative systems in specific management areas. In conducting their research, writers locate libraries that have successfully dealt with those issues. A discussion of trends and issues is often included. Since the occasional paper series began in 1971, 12 titles have been produced in areas ranging from online bibliographic search services to salary compensation systems.

The most recent paper, published in June, 1987 is "Current Approaches to Improving Access to Government Documents," by Carol Turner, University of Florida Libraries, and Ann Latta, Stanford University Libraries. It discusses the current state of bibliographic access, needs and issues, and presents twelve case studies of libraries' approaches to providing access. Based on a survey of 106 members of the Association of Research Libraries, the authors found, "The widely accepted assumption that it is too costly for most research libraries to provide standard bibliographic access to U.S. federal documents can and should be challenged . . . . There are opportunities for cooperative projects and for sharing experiences, techniques and products."

AUTOMATION INVENTORY

In October, OMS released the third annual Automation Inventory of Research Libraries. The 160-page publication features tables and listings that sum up the current state of automation at 115 ARL institutions.

The Automation Inventory has been maintained by SPEC over the past four years to respond to the most frequently-asked questions concerning research library automation. As in the past, OMS has issued the Inventory to provide administrators with an overview of trends, and to provide systems librarians with information on specific automation applications. The 1987 edition explores 18 automated functions according to six descriptive elements:

- operating status (planned, operating or modifying),
- extent of system (library only, branches campus-wide or multi-institution),
- computer ownership/use (dedicated or shared),
- public access (onsite, dial-up or local area network),
- number of work stations (reflecting the amount of activity and support for the function),
- name of vendor or network

The 18 functions covered are: acquisitions, serials check/claim, serials/union list, authority control, cataloging/utility, cataloging/local, circulation, reserve room, COM catalog, online catalog, database

searching, collection development, interlibrary loan, telefacsimile, public computing, administrative, database conversion, and reference. A complete database of automation information is maintained at the OMS and updated on a regular basis.

ELECTRONIC COMMUNICATION AND DATA SHARING

SPEC has served as a chief agent for helping ARL libraries institute electronic mail as an alternative communication medium for ARL business and communication. ALANET, the electronic mail service offered by the American Library Association, is the major e-mail network used by ARL members. In February, OMS offered a free ALANET Miniguide and current directory to ARL libraries using ALANET. Advice and assistance are provided to new subscribers both by telephone and in the newsletter. Several ARL committees established ALANET distribution lists. By mid-year, there were 215 active ARL IDs on ALANET, representing 68 separate ARL member institutions.

PROFESSIONAL STAFF AGE AND TURNOVER STUDIES

One ARL objective in 1987 was to collect the necessary demographic data to make projections about library staff characteristics over the next ten years. As a first step, age data on staff in ARL university libraries was collected. Information for this study was solicited as part of the 1986 annual salary survey. Over 90 surveys were completed and returned to OMS; an exceptionally strong response rate. A final report will be available in 1988, but preliminary findings reveal that the average age of ARL member library staffs is relatively young and that there is no significantly large group of staff about to retire.

The Management Committee is particularly interested in this finding, as it works with the Office of Management Studies to develop new staff training and development programs for member libraries.

A second study on turnover also was completed in 1987. Of the 106 academic libraries who received the turnover survey, 98 responded. The data collected will be used to provide reports on retirement and turnover patterns in ARL academic libraries. Individual libraries, for instance, will be able to see how their staff turnover patterns compare with patterns in other libraries, and directors will be able to assess more effectively employee retention conditions and project staff recruitment and replacement requirements. A preliminary report was given at the ARL Meeting in May 1987, and each library received a report during the summer. A publication, scheduled for release in 1988, will address turnover rates as they relate to size of staff, geographic regions, and population density.

RESEARCH AND SURVEYS COMPLETED, 1987

Topic	Type of Survey	Number of Respondents
Automation in ARL Libraries	Total ARL membership	115
Retrospective Conversion	(ARL Recon Project)	103
Collection Development Organization and Staffing	Targeted	53
Library-Scholar Communication	(Office of Scholarly Communication)	
Optical Discs for Storage and Access	Targeted	40
Planning for Management Statistics	Targeted	91
Job Analysis	Targeted	71
Managing Copy Cataloging	Targeted	15
Preservation Guidelines	Targeted	8
University Copyright Policies	(UCLA Graduate School of Library & Info. Sciences)	91
Performance Evaluation in Reference Services	Targeted	25
Library Evaluation Committees	Targeted (On-Demand)	25
Access to Government Documents	Total ARL Membership	91
Year of Birth (Age) Demographic Data	ARL Supplementary Statistics	102

RESEARCH AND SURVEYS IN PROGRESS, 1987

Performance Appraisal	Total ARL Membership	70
Approval Plans	Total ARL Membership	
Remote Access to the Online Catalog	Targeted	
Search Procedures for Administrators	Total ARL Membership	
Strategies for Library Fundraising and Development	Targeted	
Turnover Rates Demographic Data	Total ARL Membership	98

ORGANIZATIONAL TRAINING AND STAFF DEVELOPMENT

Library administrators have an ongoing responsibility to support the continuing growth and development of staff throughout their careers. OMS programs in this area provide an important contribution to this effort.

—Sheila Creth, Director of Libraries, University of Iowa

The Office of Management Studies is committed to helping academic and research libraries meet the changing instructional and research needs of higher education through the sound management of their available resources. Central to that mission is the conviction that improving the performance of libraries requires strong individual leadership, effective management, and specialized training programs to develop staff competence. In order to identify and develop skilled library staff and managerial talent, OMS established organizational training and staff development programs that have served over 7,000 participants since their inception in 1973.

In addition to providing the full range of institutes and special focus workshops it has successfully maintained in the past, OMS began a new institute in 1987 called Managing the Learning Process in Libraries. This institute was designed specifically for library professionals who need to understand the process of adult learning and who must develop skills and techniques for effective training. Staff who could most benefit from the four-day program include supervisors or line managers who must train staff or determine staff training needs; library personnel officers involved in the administration and guidance of training activities; librarians with bibliographic instruction responsibilities who wish to explore training methods for use in the classroom; and systems librarians concerned with training staff and patrons to use online catalogs, microcomputers, and end-user search systems.

Several weeks before the institute, participants receive a workbook on how to undertake a training needs analysis. This advance preparation ensures a common basic understanding of terms and ideas and allows individuals to follow through on personal projects during the course of the institute. Participants also have an opportunity to develop and deliver a training program in an academic research library, and assess their own strengths and weaknesses so that they can target areas for improvement. They also learn how to design programs and select the best training methodologies and media.

The first session of this new institute, attended by 25 library professionals, was held in August, 1987 in Baltimore, Maryland. It covered issues such as learning theory and practice, the skills and techniques of teaching; delivery of training; and conduct of learning events. The next institute is scheduled for August 2-5, 1988 at Notre Dame, Indiana.

A new series of workshops on Organizational Effectiveness was inaugurated in 1987 for ARL member libraries. This series is designed for a specific library situation with the overall purpose of supporting and enhancing effective organizational skills among professional and support staff. For example, at one library a series of four workshops covered supervisory roles and responsibilities; interpersonal relationships and communication in the workplace; group dynamics and team

building; and problem solving and decision making.

Throughout 1987, OMS also held eleven Institutes on Basic and Advanced Management Skills as well as Library Analytical Skills. OMS Institutes focus on the individual, provide opportunities for assessment of current skill levels, and introduce specific skills required for effective library management.

The institutes operate on the principle that participants accept learning as their own responsibility. The laboratory approach builds on the belief that adults learn most effectively from direct activity and experiences related to their daily activities. In conjunction with reflection, generalization and conceptualization of ideas and learning, participants conclude with the immediate application and use of new skills. Each institute includes structured exercises, case studies, selected readings, experiential sessions modeled on daily library operations, and an OMS Study Guide that supports the training. Institutes are offered in various geographical locations several times each year. Working with OMS staff, participants:

- identify the skills needed to improve supervisory and managerial performance
- acquire an understanding of managerial concepts and practices
- examine personal values and beliefs to determine their impact on the organization
- discover how to apply what they learn

In this era of heightened accountability and visibility, the library's overall performance depends on the abilities of each of its managers and supervisors to solve complex technical and personnel problems on a day-to-day basis. As more individuals in a library attend institutes, the organization's overall ability to handle problems, decisions and planning is improved, and the effectiveness of management and personnel at all levels is enhanced.

BASIC MANAGEMENT SKILLS INSTITUTES

These 3 ½ day institutes are geared to library professionals with some managerial, administrative or supervisory responsibilities, and to those interested in library management careers. Sessions focus on the role of academic library managers, and address specific issues such as motivation of staff, interpersonal behavior and skills, decision-making, effective use of groups, supervisory leadership and communication. Designed to highlight the individual's relationship to the library organization, these institutes give participants an opportunity to reflect on their current approach to managerial and supervisory responsibilities and to become acquainted with techniques associated with effective management.

ADVANCED MANAGEMENT SKILLS INSTITUTES

These 5 ½ day programs are designed for those who hold senior management positions and those seeking proficiency in top-level executive responsibilities. Through simulation of a library organization, participants observe the effects of intervention on the system as a whole. The sessions emphasize executive leadership, planning and goal-setting, building management teams, information requirements of executive decision-making, and organizational diagnosis and change. Participants receive a number of well-tested survey instruments which serve as the basis for a self-assessment and personal awareness profile. The results of these surveys assist in the process of connecting the workshop agenda to experiences in the work environment.

LIBRARY ANALYTICAL SKILLS INSTITUTES

This 3 ½-day institute is designed for library professionals seeking to expand their problem-solving and project planning skills. The focus is on strengthening the skills needed to effectively observe, diagnose and initiate changes in library operations. Several weeks before the institute, participants receive a workbook on statistical concepts and vocabulary. This advance preparation ensures a basic understanding of terms and ideas that will be used to discuss case studies during the institute. Participants have an opportunity to use the resources of an academic research library and simulate an examination of library operations.

They choose from a number of projects that illustrate common library problems such as measuring materials availability, evaluating library staff work, and preparing a cost benefit analysis. Participants return to their home libraries prepared to evaluate operations, demonstrate accountability, make a case for financial support, measure user satisfaction, or carry out other such projects that are valuable in meeting the demands faced by library managers today.

SPECIAL FOCUS WORKSHOPS

These short, one or two-day workshops cover a single topic or two closely related topics selected by an individual library. They have proven to be most useful to libraries faced with new situations which affect a large portion of the staff and require a clear understanding of organizational goals. OMS designs the programs to meet the specific needs of the individual library. For example, workshops have been prepared on implementing an automated system, undertaking a new system of performance review, and establishing a new administrative structure. The programs provide a mixture of conceptual models and

working techniques, and include self-assessment tools and case studies that relate those concepts to the academic library environment. Other special workshop topics include time management, strategic planning, team building and group decision-making, program evaluation, time management, supervisory skills, conflict resolution, and using behavior pattern analysis as an organizational tool.

CONSULTATION FOR IN-HOUSE PROGRAMS

The OMS staff provides assistance and training materials to libraries interested in offering in-house staff training and development programs. Especially valuable to libraries unable to devote staff time and efforts to developing such programs, this consultative service creates and provides training materials oriented to the specific needs of the library. Outcomes range from detailed recommendations for change to improved awareness of complex issues facing academic libraries. The library staff plays a major role in conducting the programs, often adapting commercially available materials and implementing self-administered tools. In many instances, the consulting services are provided by graduates from the OMS Consultant Training Program.

SPECIAL FOCUS WORKSHOPS AND PRESENTATIONS

Library Association of Alberta	Staff Motivation and Morale	63
Florida State University	Performance Management	25
Georgetown University Law Library	Techniques of Problem Solving	32
University of Missouri, Columbia	In Search of Excellence	47
State University of New York, Buffalo	Effective Use of Groups In Libraries	17
Boston Library Consortium	Executive Management Seminar	12
Brooklyn College	Review of Planning Program	—
Society of American Archivists	Preservation Planning Program	50
Society of American Archivists	The Preservation Management Institute for Archivists	20
University Center Libraries, Atlanta, GA	Collection Assessment	40

TRAINING AND STAFF DEVELOPMENT INSTITUTES AND WORKSHOPS

Location	Type	Number of Participants
BASIC MANAGEMENT SKILLS INSTITUTES		
Chicago, Illinois	Public	44
University of Texas, Arlington	Sponsored	40
University of Texas, El Paso	Sponsored	41
Washington, D.C.	Public	28
Washington, D.C. (designed for USGPO depository librarians)	Sponsored	32
ADVANCED MANAGEMENT SKILLS INSTITUTES		
Philadelphia, Pennsylvania	Public	38
Asilomar, California (designed for AULs in ARL libraries)	Public	25
Australia	Sponsored	25
Australia (Review & Update)	Sponsored	25
ANALYTICAL SKILLS INSTITUTES		
Honolulu, Hawaii	Public	18
Syracuse, New York	Public	23
MANAGING THE LEARNING PROCESS INSTITUTES		
Baltimore, Maryland	Public	31
Australia	Sponsored	15
ORGANIZATIONAL EFFECTIVENESS WORKSHOPS		
University of California, Santa Barbara (Series of four)	Sponsored	20 each
Rutgers University	Sponsored	39

CONSULTANT TRAINING PROGRAM ROSTER

In 1987, Consultant Training Program graduates continued to participate in self-study and training events with OMS staff.

Consultant Training Program participants are graduates of OMS Consultation Skills Workshops and practicums held between 1979 and 1983. Since graduating, they have been available to work on library studies, research and publications, and training programs. CTP graduates have designed study interventions, prepared organizational assessments, and participated in related workshops, institutes and conferences. Graduates also use the skills they acquired through the program to benefit their home institutions.

The roster which follows has been updated by the graduates themselves. Project category abbreviations are:

Academic Library Development Program	ALDP
Analytical Skills Institute	ASI
Principal consultant	PC
Collection Analysis Project	CAP
Management Review and Analysis Project	MRAP
Management Skills Institute	MSI
Organizational Screening Program	OS
Practicum	P
Preservation Planning Program	PP
Planning Program for Small Academic Libraries	PPSAL
Public Services Project	PS
Research/Writing assignment	R/W
Training program	T

CONSULTANT TRAINING PROGRAM PARTICIPANTS

CONSULTANT TRAINEE	CLASS	ASSIGNMENTS
Alldredge, Noreen S. Director of Libraries Montana State University Bozeman, MT 59719	1980	Univ. of IL, Chicago Circle CAP (P)
Bellefontaine, Arnold Executive Officer National Programs Department Library of Congress Washington, D.C. 20540	1981	Columbia, MD. MSI (T); Univ. Ctr. of GA. Stress Workshop, (T); Univ. of Chicago Supervisory Skills (T);George Washington Univ. CAP (P)
Bennett, Annalea 14755 Ventura Building #1904 Sherman Oaks, CA 94941	1981	Brandeis Univ. Tech Services Planning Study (P)
Berson, Bella Z. Associate University Librarian and Director Medical Library Yale University 333 Cedar Street New Haven, CT 06510	1980	Consultation Skills Workshop (T); Univ. of CA Public Services Workshop (T)
Bowman, Martha University Librarian University of Louisville Louisville, KY 40292	1981	Howard University CAP (P)
Branin, Joseph Director, Humanities and Social Sciences Libraries University of Minnesota	1981	Miami Univ. ALDP (P); Nashville, TN, Mobile, AL MSI (T)
Brii, Patricia L. Collection Development Officer California State University, Fullerton University Library P.O. Box 4150 Fullerton, CA 92634	1982	Tucson, AZ MSI (T)
Chambers, Joan Director of Libraries Colorado State University Fort Collins, CO 80523	1981	Cal. State Univ., Sacramento ALDP (P)
Cottam, Keith Director of Libraries University of Wyoming P.O. Box 3334, University Station Laramie, WY 82071	1980	Ohio State Univ. & Columbia, MD MSI (T); Univ. of Houston PS (P)
Cronin, Mary J. University Librarian O'Neill Library Boston College Chestnut Hill, MA 02167	1983	Chicago, IL MSI (T); OMS Occasional Paper (R/W) Chicago, MSI 1987; Univ. of Pittsburgh PS
Dillon, Howard W. Associate Director for Public Services The University of Chicago Chicago, IL 60637	1980	Ball State Univ. MRAP (P); North Park College PPSAL (C)
Dyson, Allan J. University Librarian University of California, Santa Cruz Santa Cruz, CA 95064	1983	

CONSULTANT TRAINEE	CLASS	ASSIGNMENTS
Euster, Joanne R. University Librarian Rutgers University Libraries New Brunswick, NJ 08901	1980	OMS Occasional Paper (R/W); North Texas State Univ. OS (P)
Foltin, Bela P.O. Box 151 Blacksburg, VA 24060	1983	
Hagyard, Alan E. Physical Science & Geology Librarian Yale University Library New Haven, CT 06517	1983	Boston, MA Advanced MSI (T)
Haikalis, Peter D. Asst. Director, Readers Services San Francisco State University Library San Francisco, CA 94132	1982	Univ. of CA, Riverside PS Services Univ. of MO, Columbia MSI (T)
Haka, Clifford H. Head, Access Services Michigan State University East Lansing, MI 48824	1983	OMS Occasional Paper (R/W); El Pasc, TX Basic MSI (T)
Halliblade, Shirley Assoc. Director Jean & Alexander Heard Lib. Vanderbilt University Box 155, Peabody College Nashville, TN 37203-5601	1982	Univ. of North Carolina PS (P)
Hardesty, Larry Library Director Eckerd College St. Petersburg, FL 33733	1980	Lake Forest College PPSAL (P)
Harris, Carolyn Head, Preservation Dept. Columbia University Libraries New York, NY 10027	1982	Boston, MA MSI (T); Johns Hopkins Supervisory Skills Work- shop (T); Univ. of MO and Univ. of TN PP (P)
Heath, Fred Milton University Librarian University of North Alabama Florence, AL 35630	1980	St. Olaf Coll. PPSAL (P) Carleton College and Witten- berg College; PPSAL (C)
Hoffmann, Ellen Director of Libraries York University 4700 Keele St. Downsview, Ontario CANADA M3J 1P3	1982	Brown Univ. PS (P)
Howard, Clinton Acquisitions Librarian University of Kansas Lawrence, Kansas 66045	1981	
Hubbard, Willis M. College Librarian Gettysburg College Gettysburg, PA 17325-1493	1981	Bloomsburg Univ. PPSAL (P)
James, Olive C. Library Director San Francisco State University San Francisco, CA 94132	1983	Consultant for Reference Services, Yale Univ. Lib.
Jaynes, Phyllis E. Director of User Services Dartmouth College Library Hanover, NH 03755	1980	McGill Univ. CAP (P)

CONSULTANT TRAINEE	CLASS	ASSIGNMENTS
Jones, William G. Assistant University Librarian University of Illinois Chicago Circle Campus Box 8198 Chicago, IL 60680	1980	Hanover College PPSAL (P); OMS Occasional Paper (R/W); Minneapolis, MN MSI (T); St. Joseph's College PPSAL (C)
Kennedy, Gail A. Assistant Director for Technical Services University of Kentucky King Library Lexington, KY 40506	1983	SPEC Kit (R/W)
Kohl, David F. Asst. Director for Undergraduate Libraries University of Illinois at Urbana-Champaign Champaign, IL 61801	1983	Philadelphia, PA MIS (T)
Koziowski, Marianne Programmer, MCS Company Address in Question	1980	Temple Univ. OS (P); Minnapolis, MN MSI (T); St. Xavier College PPSAL (C)
Kupersmith, John Asst. for Computer-based Information General Libraries University of Texas at Austin Austin, TX 78712	1983	El Paso, TX Basic MSI (T)
Leach, Ronald Dean of Libraries Cunningham Memorial Library Indiana State University Terre Haute, IN 47809	1981	Univ. of MI, Coping with Chang Workshop (T); Ohio State Univ. MSI (T)
Leinbach, Philip E. University Librarian Tulane University Library New Orleans, LA 70118	1981	York Univ. Supervisory Skills Workshop (T)
Lockett, Barbara Rice Director of Libraries Folsom Library Rensselaer Polytechnic Institute Troy, NY 12180-3590	1981	St. Univ. of NY, Stony Brook (P) and OH St. Univ. PP (C)
Lowry, Charles Library Director Library Administration Box 19497 University of Texas at Arlington Arlington, TX 76013	1980	Transylvania College PPSAL (P)
Mackey, Neosha Ann Associate Dean Duane G. Meyer Library Box 175 Southwest Missouri State University Springfield, MO 65804-0095	1980	Minneapolis, MN MSI (T)
Martell, Charles Dean and University Librarian California State University 2000 Jed Smith Drive Sacramento, CA 95819	1981	San Jose, CA OS (P); Univ. of Pittsburgh MSI (T)
Martin, James R. Asst. Director for Public Services Florida State University Strozier Library - Rm. 105 Tallahassee, FL 32306	1983	Chapel Hill, NC IRL (P)

CONSULTANT TRAINEE	CLASS	ASSIGNMENTS
McCarthy, Connie K. Asst. University Librarian for Collections Gelman Library George Washington Univ. Washington, D.C. 20052	1982	Georgetown Univ. CAP (P)
McClung, Patricia Assoc. Dir. of Prog. Coordination The Research Libraries Group, Inc. Jordan Quadrangle Stanford, CA 94305	1983	Univ. of OR MSI (T); AALS Workshop (T); Univ. of OR PP (P) Univ. of S. Cal Leadership Seminar (T)
McCool, Donna L. Asst. Director for Admin. Services Washington State University Library Pullman, WA 99164	1980	Univ. of British Columbia CAP (P); SPEC Kit (R/W)
McDonald, David R. Asst. Director of Systems University Library University of Michigan Ann Arbor, MI 48109-1185	1982	Univ. of TX, Case Western Reserve Univ. MSI (T); San Diego, CA ASI (T); Montreal ASI (T); Baton Rouge ASI (T)
Miller, Arthur College Librarian Lake Forest College Lake Forest, IL 60045	1981	Gannon Univ. PPSAL (P); Alverno College, PPSAL (C)
Miller, R. Bruce Asst. University Librarian Technical Services C075G University of California, San Diego La Jolla, CA 92093	1982	Vanderbilt Univ. CAP (P); San Diego, CA ASI (T); Univ. of FL ASI (T)
Mirsky, Phyllis S. Assoc. University Librarian C075G University of California, San Diego La Jolla, CA 92093	1983	North American Collections Inventory Project (T) Asst./Assoc. Dir. Workshop (T)
Myers, Margaret Director, OLPR/ALA 50 East Huron Street Chicago, IL 60611	1982	Johns Hopkins Supervisory Skills Workshop (T)
Nye, Julie B. Functional Design Manager, TLRN CB#3940, Wilson Library UNC - Chapel Hill Chapel Hill, NC 27599-3940	1983	Duke Univ. CAP (P); Coral Gables, FL MSI (T)
Parent, Roger H. Deputy Executive Director American Library Assn. 50 E. Huron Street Chicago, IL 60611	1980	Univ. of CA Public Services Workshop (T); San Diego, CA MSI (T)
Peters, Paul E. Systems Coordinator Directors Office, Room 213 New York Public Library 5th Ave. & 42nd St. New York, N.Y. 10018-2788	1982	Consultation Skills Workshop (T); Pittsburgh, PA ASI (T); Emory ASI (T)
Peyton, Anne Assoc. Director, Capital Giving Blunt Alumni Center Hanover, NH 03755	1980	DePaul Univ. PPSAL (P); New Hampshire MSI (T); Mass. Inst. of Tech. MSI (T)

CONSULTANT TRAINEE	CLASS	ASSIGNMENTS
Phipps, Shelley Asst. University Librarian for Branch Services University of Arizona Main Library Tucson, AZ 85721	1981	Univ. of CO CAP (P); HARLIC, Houston, TX, Univ. of Alberta MSI (T) Louisville MSI (T) Airlie MSI (T) Washington, DC Adv. MSI (T)
Query, Lance D. Director, Library Research, Analysis, and Personnel Northwestern University Evanston, IL 60201	1983	Center for Research Libraries PP (P)
Racine, John D. Program Director, Research Libraries OCLC, Inc. 6565 Frantz Road Dublin, OH 43017	1983	Colorado State Univ. PP (P); Iowa State Univ. PP (C)
Randall, Ann K. Chief Librarian City College of CUNY 138th Street at Convent Ave. New York, NY 10031	1982	Temple Univ. PS (P)
Reed, Grace M. ARMCO 703 Curtis Street Middletown, OH 20540	1980	Univ. of MD CAP (P); Theological Lib. Assoc. MSI (T)
Reuland, Anne Information Services Librarian Vanderbilt University Nashville, TN 37240-0007	1983	Columbia, MD MSI (T)
Richardson, Jeanne Collections Development Coordinator Hayden Library Arizona State University Tempe, AZ 85281	1983	Cornell Univ. CAP Planning (T)
Robison, Dennis E. University Librian James Madison University Harrisonburgh, VA 22807	1980	Earlham College PPSAL (P)
Sampson, Karen L. Manager - Administration U.S. West Information Systems 6200 South Quebec Street Englewood, CO 80111	1982	Alberta, Canada MSI (T)
Scepanski, Jordan M. Director, University Library and Learning Resources California State University, Long Beach Long Beach, CA 90840	1980	Univ. of Notre Dame CAP (P); Univ. of Evansville PPSAL (C); Nebraska MSI (T)
Schneider, D.W. Associate Director for Public Services Louisiana State University Baton Rouge, LA 70803	1981	Univ. of Houston CAP (P)
Shapiro, Beth J. Deputy Director Michigan State University Library East Lansing, MI 48824	1983	
Shaughnessy, Thomas Director University of Missouri Library Columbia, Missouri 65201	1981	Univ. of Tulsa ALDP (P)

CONSULTANT TRAINEE	CLASS	ASSIGNMENTS
Skivington, Kristen D. Department of Communication Michigan State University East Lansing, MI 48824-1212	1982	Columbia, MD Advanced MSI (T)
Soete, George Asst. University Librarian Collection Development University of California, San Diego La Jolla, CA 92093	1980	SPEC Flyer/Kit (R/W); Brigham Young Univ. CAP (P); Huntington College, Franklin College, Goshen College PPSAL (C): Univ. of CA, Berkeley Public Services Workshop (T); Boulder, CO, Columbia Univ., Tucson, AZ, Univ. of Oregon MSI (T); NCIP Training, Univ. of Southern California (C); Scottsdale MSI (T); Colorado State MSI (T); Oregon State (CAP); Brown MSI (T); Univ. of WY CAP (C); Univ. of Houston, Univ. of TX--Arlington, Denver, CO, Atlanta, GA MSI (T); Philadelphia, PA Adv. MSI (T)
Swanson, Patricia Asst. Director for Science Libraries The John Crerar Library of the University of Chicago 5730 South Ellis Chicago, IL 60637	1981	Univ. of MI CAP (P); Performance Appraisal, Northern IL Univ. (T); Consultation Skills Workshop (T); Univ. of AZ Planning Retreat (T); Univ. of Pittsburgh Communication & Long Range Planning Workshop (T); University of Alberta MSI; Tucson, AZ Basic MSI (T); Univ Chicago Organizational Skills for Beginning Librarians (T); Columbia MSI (T); Annapolis for AULS MSI (T); Washington, DC for Fed. Doc. Libns. MSI
Tanno, John W. Assoc. University Librarian University of California Riverside, CA 92507	1982	University of Alberta CAP (P)
Trochim, Mary Director Ithaca Community School of Music and Arts Ithaca, NY 14850	1981	Dillard Univ. Atlanta College of Art Small College Collection Assessment (P); Tougaloo College, Tuskegee Institute Sm. Coll. Collection Assessment (C); Cornell MSI (T)
von Wahlde, Barbara Director of Libraries University Libraries SUNY-Buffalo 432 Capen Hall Buffalo, NY 14260	1983	Northwestern Univ. PP (P)
Walch, David Dean of Library Services California Polytechnic State Univ. San Louis Obispo, CA 93407	1981	Univ. of Arizona OS (P)
Wand, Pat (formerly Silvernail) Asst. University Librarian for Public Services University of Oregon Eugene, OR 97403-1299	1983	San Diego, CA MSI (T)
Wells, H. Lea Library Consultant 6714 E. Los Arcos St. Long Beach, CA 90815	1981	SPEC Flyer/Kit (R/W); Toronto MSI (T); Scottsdale MSI (T)

CONSULTANT TRAINEE	CLASS	ASSIGNMENTS
Whildin, Sara Lou Campus Head Librarian Pennsylvania State University Delaware County Campus 25 Yearsley Mill Road Media, PA 19063	1980	Franklin & Marshall Coll. CAP (P)
Yocum, Patricia B. Head, Natural Science Library 3140 Nat. Science Bldg. University of Michigan Ann Arbor, MI 48109	1983	Ind., NCIP (P); Mankato State Univ. Collection Description (T); MI State Univ. Collection Description (C)
Zaldberg, David S. Head of Special Collections UCLA Library 405 Hilgard Ave. Los Angeles, CA 90024	1982	Catholic Univ. of America CAP (P); SPEC Kit #100 Collection Security (R/W)

PRIORITIES FOR 1988

During 1988, OMS will consider initiatives in the following areas:

- planning an ARL Directors' Institute on a specific topic in 1989
- testing an electronic conferencing system for committee operations
- designing a financial management skills institute
- developing a process for designing and operating a campus-wide information system

OMS will be seeking external funding support for a technical services study; a training program for preservation administrators; and a demonstration project using the North American Collections Inventory for cooperative activities.

In collaboration the ARL Committee on Collection Development, OMS will focus on the impact of the increased cost of serials, developing a clearinghouse capability for information. The Office will seek to establish a working relationship with AAU and ACLS on this issue.

As in the past, OMS will continue to work with other ARL committees on projects of special interest and importance, most notably in the areas of preservation and statistics.

The priorities for the OMS are established by the Committee on the Management of Research Library Resources after careful deliberation of the needs and challenges of ARL libraries. Research and development priorities of the office for 1988 will focus on technology, financial skills, and preservation training.

—Sul H. Lee, Dean,
University Libraries
University of Oklahoma

RESEARCH AND DEVELOPMENT

- Phase III of the North American Collections Inventory Project will be completed. Under this program, conspectus tools and resources will continue to be developed in cooperation with RLG. Public Service Conspectus tools will be developed and tested at Dartmouth College, and Conspectus software for microcomputers will be distributed. Cooperative activities with C.A.R.L. and the National Library of Canada will also continue.
- Plans will be finalized to assure the ongoing operation of the North American Collections Inventory beyond June 1988. Procedures and a cost recovery plan will be designed to maintain basic support activities, and projects for using the Conspectus to support cooperative programs in collection development and/or preservation will be considered for funding.
- OMS staff will prepare a proposal to develop a process for designing and operating an integrated campus information system, building on existing and emerging library systems. Up to three cooperating libraries will be identified for development and testing.

- An ongoing in-house training program will be designed and operated at the National Library of Canada. This will include a six-day training-the-trainers workshop for selected staff, as well as a Basic Management Skills Institute for all library staff.
- A Financial Skills Institute will be planned for October 1988. This new institute will be designed and conducted by OMS staff.

ACADEMIC LIBRARY PROGRAM

OMS expects to start up to ten new library studies in the areas of collection, preservation, public service, and leadership development. Self-study resources will be maintained in the following eight areas, with emphasis on the first five:

- Leadership Development Program
- Preservation Planning Program
- Public Services Study
- Collection Analysis Project
- Organizational Screening
- Planning Program for Small Academic Libraries
- Academic Library Development Program
- Management Review and Analysis Program

SYSTEMS AND PROCEDURES EXCHANGE CENTER

The SPEC clearinghouse will continue to develop on-demand services tailored to individual library needs using a variety of databases and communication technologies. It will also seek to work with other professional groups and ARL committees to design surveys and research projects. Operational issues under consideration for monthly kits during 1988 include the following:

- performance appraisal
- approval plans
- building use policies
- remote access to the online catalog
- search procedures for administrators
- analysis and use of management statistics
- electronic mail
- library publication programs
- remote storage
- brittle books
- user surveys

Collaborative research-writers will be selected to work on these issues as well as occasional papers. The subjects for papers have been identified as:

- Alternative Strategies for Library Fundraising and Development
- University Copyright Practices and Policies

- Selection of the University Librarian
- Final Report on Staff Turnover
- Telecommunications Technology in Large Research Libraries

The Automation Inventory will continue. In the Spring, a call will be issued for new information, and an updated publication will be released in late Summer.

ORGANIZATIONAL TRAINING AND STAFF DEVELOPMENT

In 1988, OMS will be offering two Basic Library Management Skills Institutes, one Advanced Library Management Skills Institute, and two Library Analytical Skills Institutes. The new institute, Managing the Learning Process in Libraries: How to Make Training Work, will be offered again in August, 1988 at Notre Dame, Indiana.

OMS will be also be conducting up to eight additional Management Skills Institutes on a sponsored basis, and up to 15 Special Focus Workshops. The training staff will redesign and plan two Institutes for Directors in 1989, and update bibliographies as well as the Advanced Institute Notebook.

OTHER ACTIVITIES

OMS also will work with ARL committees on collection development, bibliographic control, preservation and statistics projects.

ARTICLES AND PRESENTATIONS BY OMS STAFF

Systems and Procedures Exchange Center: Learnings from the Past Ten Years; Maxine Sitts, at a meeting on Information Resources for Archives and Records Administrators sponsored by the National Association of Government Archives and Records Administrators, June, 1987.

Learnings from a Library Management Data Sharing Project; Maxine Sitts and Jennifer Mauldin, Tufts University Planning Information Systems; at the American Library Association Conference, June 1987.

Leadership Development Program: Building a Commitment to the Future; Susan Jurow and Duane Webster, at the American Library Association Conference, June 1987.

SPEC Kit exhibit; at the Publishers Book Exhibit, 1987 New York, North Carolina, Midwest & Virginia/Washington D.C. Library Association Conferences, October/November 1987.

Collection Management: How Automation Can Help; Jutta Reed-Scott, at Annual Conferences of New England Library Association and New England Educational Media Association, September 29, 1987.

So We Have Measured Our Collections—Now What? Jutta Reed-Scott, at Fall Conference of ACRL New England Chapter, November 16, 1987.

"Developments in the North American Collections Inventory Project." Jeffrey J. Gardner, at Ontario College and University Library Association Winter Meeting, February 27, 1987.

"National Collections Inventory Project: A Brief Description." Jeffrey J. Gardner, in Encyclopedia of Library and Information Science, vol. 41, Supplement 6, pp. 229–30 (1987).

"Interpersonal Relations and Communication Skills," Jeffrey J. Gardner, at Joint Spring Workshop of the Library and Information Science Organizations of Metropolitan Washington, D.C., March 20, 1987.

"Libraries." Duane E. Webster, in Higher Education Bibliography Yearbook 1987, pp. 33–48.

"The ARL Preservation Planning Program: Self-Assessment as an Improvement Strategy." Duane E. Webster, at the Society of American Archivists Annual Conference, New York, September 4, 1987.

"Assessing Library Capabilities." Duane E. Webster, at the Fifth Annual State University System of Tennessee Regents Conference on Higher Education, Nashville, April 6, 1987.

"Conservation and Preservation Programs in Research Libraries," and "RLG Conspectus and the North American Collections Inventory Project." Duane E. Webster, at Colloquia of the Australian Information Management Association, University of Sydney, November 16, 1987.

"Examining the Broader Domain." Duane E. Webster, in The Journal of Academic Librarianship, May 1986.

O M S S T A F F

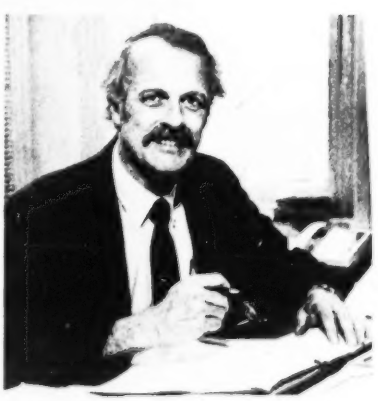
DUANE E. WEBSTER

Mr. Webster joined the Association of Research Libraries in 1970 to establish the Office of Management Studies. As Deputy Executive Director, he assists in the planning, development, and operation of programs for ARL, an organization which represents the interests of the 118 largest research libraries in the United States and Canada. As Director of the Office of Management Studies, he works to strengthen the management capacity of these libraries. During his tenure at ARL, Mr. Webster has designed study processes to assess public services, management systems, collections, and preservation programs in large research libraries. In addition, he has created planning and development studies for small and mid-sized academic libraries. He has served as a consultant to over 80 libraries and has written widely on the topics of organizational development and performance improvement for libraries. Since November 1987, he served as Interim Executive Director of ARL.

Mr. Webster received his M.A.L.S. from the University of Michigan in 1964 and worked for the University of Michigan Library, the Rochester Public Library, General Dynamics Corporation Library, and the NASA Electronics Research Center.

In 1987, the Association of College and Research Libraries named Mr. Webster the Academic Research Librarian of the Year.

JEFFREY J. GARDNER



Associate Director of OMS since 1985, and Interim Director of OMS since November, 1987, Mr. Gardner develops and manages special programs for academic and research libraries. He is responsible for supervising and training in the areas of collection development and management, and he operates the Collection Analysis Project which he designed for OMS. In addition, Mr. Gardner manages the North American Collections Inventory Project (NCIP), works with academic libraries on organizational development projects, and supervises self-studies on public services and collection management.

Mr. Gardner received his B.S. from Tufts University and his M.L.S. at Simmons College. He has worked for public, special, and university libraries including M.I.T. where he was director of the Project Intrex Model Library Program from 1967 to 1973. He then joined the Office of Management Studies as Management Research Specialist, and served as an Associate from 1978 to 1985.

SUSAN JUROW

Program Officer for Training, Ms. Jurow assesses library training needs, designs training resources and services, and conducts training and staff development programs. These include the Organizational Training and Staff Development Program, management and operational workshops as well as specialized institutes, seminars, and consultation for in-house programs. She monitors emerging professional and management developments in order to design programs that meet the unique needs of academic and research libraries.

Prior to joining OMS, Ms. Jurow was Assistant to the Director of the Northern Regional Library Facility, University of California, Richmond Field Station. She has also served as acting head of the Reference Department, M.D. Anderson Library, University of Houston; business reference librarian and coordinator of Computerized Information Retrieval Services at the University of Houston Library; and Head of the Current Periodicals and Microtexts Division at Stanford University's Green Library. She received her B.A. from Stanford University and her M.L.S. from Rutgers University.

JUTTA REED-SCOTT

Since 1983, Jutta Reed-Scott has served as part-time Collection Development Specialist and Project Coordinator for OMS. She is a principal investigator for the North American Collections Inventory Project, developing technical documentation, providing training, and coordinating collection evaluations in research libraries. Ms. Reed-Scott also managed Preservation Planning Program studies funded by the National Endowment for the Humanities as well as those operated under the Academic Library Program

Prior to her work at OMS, Ms. Reed-Scott served as Director of Collection Development and Bibliographic Control at Dartmouth College Library; Collections Development Librarian at Massachusetts Institute of Technology; Associate Humanities Librarian at M.I.T., and head of the Reference Department of George Washington University. She received a B.A. in history from the University of Maryland, and an M.A. in Library Science from the School of Library and Information Service, University of Maryland.

MARIANNE SEALES

As Office Manager, Ms. Seales provides administrative and operational support to the OMS staff. She assists in scheduling, producing and maintaining office services and resources; serves as administrative assistant for the Deputy Executive Director; and assists the Training Program Specialist. Ms. Seales' responsibilities include arranging meeting space, housing, schedules, and travel; and preparing progress reports.

Prior to joining OMS in 1983, Ms. Seales served as Administrative Assistant to the Membership Development Coordinator for the National Association of Social Workers. She received a B.S. in Sociology from Tennessee State University in 1981, and has completed a training program in office management.

MAXINE K. SITTS

Ms. Sitts joined the Office of Management Studies in 1977 to develop and manage information sharing, clearinghouse, survey and publication services for member organizations and other academic libraries. As Information Services Specialist, she also develops new member services; administers grant projects; produces a monthly publication series for academic library administrators; and designs marketing support for OMS programs.

Formerly a journalist in New York City, Ms. Sitts joined the ERIC Clearinghouse on Information Resources at Stanford University as Publication Director in 1971. She was elected President of the Washington Education Press Association for 1982–83, and has chaired the Intellectual Freedom Committee of the Washington, D.C. Library Association. She is a magna cum laude graduate of the State University of New York, with a B.A. in English, and has done graduate work in English and journalism at Wagner College, Staten Island and Stanford University.

KAREN A. WELTER

Ms. Welter joined OMS in 1985 to work on publication and staff development programs. As Editorial Assistant, she coordinates the production of a monthly publication series; designs and edits the North American Collections Inventory Project newsletter; provides graphic design services for the office; and produces special publications. As OMS Meeting Planner, Ms. Welter also administers the scheduling and technical aspects of training programs. She received a B.S. in Journalism from the University of Illinois, Cahmpaign–Urbana in 1987.

OMS PUBLICATIONS

OCCASIONAL PAPERS

Substantive papers addressing a targeted issue.

NEW

OP13 SELECTION OF THE UNIVERSITY LIBRARIAN. Ruth J. Person and George C. Newman. February 1988. 23 pages plus appendices.

OP12 CURRENT APROACHES TO IMPROVING ACCESS TO GOVERNMENT DOCUMENTS. Turner, Carol and Ann Latta. June 1987. 44 pages.

OP11 Flower, Kenneth E. "Academic Libraries On the Periphery: How Telecommunications Information Policy is Determined in Universities." April 1986. 43pp.

OP10 Haka, Clifford H. and Nancy Stevens. "A Guidebook for Shelf Inventory Procedures in Academic Libraries." July 1985. 24pp.

OP09 Cronin, Mary J. "Performance Measurement for Public Services in Academic and Research Libraries." February 1985. 36pps.

OP08 Veaner, Allen B. "The Assistant/Associate Director Position in ARL Libraries." July 1984. 54pp.

OP07 Vasi, John. "Budget Allocation Systems for Research Libraries." January 1983. 39pp.

OP06 Euster, Joanne R. "Changing Patterns in Internal Communication in Large Academic Libraries." July 1981. 21pp.

OP05 Jones, William G. "Salary Compensation Systems for Librarians: A Study of Ten Members of the Association of Research Libraries." May 1981. 24pp.

OP04 Wax, David M. "A Handbook for the Introduction of On-Line Bibliographic Search Services into Academic Libraries." June 1976. 62pp.

OP02 Webster, Duane E. "Library Policies: Analysis, Formulation and Use in Academic Institutions." November 1972. 40pp.

OP01Webster, Duane E. "Planning Aids for the University Library Director." December 1971. 27pp.

FINAL REPORTS FROM OMS STUDIES

Preservation Planning Program Reports

PP01 Dartmouth College, Preservation Report, 1981. 25pp.

PP02 University of Virginia, Preservation Planning Project Report, 1981. 58pp.

PP03 University of Washington, Final Report of the Preservation Project Study Team, 1981. 38pp.

PP04 State University of New York at Stony Brook, Preservation Planning Program Study Report, 1985. 35pp.

PP05 National Library of Medicine, Preservation of the Biomedical Literature: A Plan for the National Library of Medicine. 1985. 55pp. plus appendices.

PP06 Colorado State University, A Preservation Program for the Colorado State University Libraries. 1985. 19pp.

PP07 Smithsonian Institution Libraries, SIL Preservation Planning Program. 1986. 50pp. plus appendices.

PP08 University of Tennessee, Knoxville Library, Preservation Planning Program Library Final Report. 1986. 28 pages.

PP09 Northwestern University, Final Report of the Preservation Planning Program Study Team, Northwestern University Library. 1986. 46pp.

PP10 The Center for Research Libraries, Final Report of the Preservation Planning Program Study Team, Center for Research Libraries. 1986. 38pp.

PP11 University of Oregon, Preservation Program for the University of Oregon Library, The Final Report of the Preservation Planning Program. 1986. 44pp.

PP12 University of Missouri, Preservation at the University of Missouri--Columbia Libraries, A Report Prepared for the Director of Libraries. 1986. 56pp.

PP13 Ohio State University, Preserving The Ohio State University Libraries' Collections: The OSUL Preservation Planning Program. 1986. 74pp. plus appendices.

PP14 Iowa State University, Preservation Planning Program Final Report. 1987. 48pp.

OTHER PUBLICATIONS

Results of studies, conferences, and special projects

PB12 Sitts, Maxine K., ed. The Automation Inventory of Research Libraries, 1987. October 1987. 160pp.

PB11 Busch, B.J. "Integration of Public and Technical Services Functions." Visiting Librarian Paper. November 1986. 25pp.

PB10 Sitts, Maxine K., ed. "The Automation Inventory of Research Libraries, 1986." September 1986. 160pp.

PB07 Sitts, Maxine K., ed. "The Automation Inventory of Research Libraries." August 1985. 80pp.

PB06 "Subject Index to SPEC Kits." Index to kits and flyers. 1987.

MANUALS AND RESOURCE NOTEBOOKS

How-to tools

SEE ALSO OP10 UNDER OCCASIONAL PAPERS

RN03 Rosenberg, Jane E.; Sullivan, Maureen. "Resource Notebook on Staff Development" June 1983. 309pp.

RN02 Gardner, Jeffrey J. "Resource Notebook on Planning" February 1979. 155pp.

RN01 Webster, Duane E. "Resource Notebook on Organization" January 1979. 147pp.

(SS01 AND SS02 AVAILABLE AS A SET)

SS01 Darling, Pamela W. and Webster, Duane E. "Preservation Planning Program, An Assisted Self-Study Manual for Libraries." NEW 1987 EDITION. 156pp.

SS02 Wesley Boomgaarden. "Preservation Planning Program Resource Notebook." NEW 1987 EDITION. 700pp.

SS03 Trochim, Mary Kane. "Measuring the Book Circulation Use of a Small Academic Library Collection: A Manual." ISBN 0-918006-50-3. 1985. 73pp.

ARL MANAGEMENT SUPPLEMENTS

Articles with an in-depth view of topics covered in SPEC Kits.

MS51 "Library Use Instruction in Academic/Research Libraries." 1977.

MS41 Cottam, Keith M. "Professional Specialists in Academic Libraries." 1976.

MS22 Wax, David; Morrison, R.D., Jr.; and Gardner, Jeffrey J. "The Delivery of Computer-Based Bibliographic Search Services by Academic and Research Libraries." 1974.

MS21 Dionne, Richard J. "Review of the Formulation and Use of Objectives in Academic and Research Libraries." 1974.

MS14 Gardner, Jeffrey J., ed. "Review of Management Training Activities in Academic and Research Libraries." 1973.

MS11 Frankle, Suzanne and Webster, Duane E., eds. "Review of Planning Activities in Academic and Research Libraries." 1972.

Public Services Study Reports

PSS1 Brown University, 1984. 62pp.

PSS2 University of California, Riverside, 1984. 59pp.

PSS3 Columbia University, 1984. 84pp.

PSS4 Michigan State University, 1983. 126pp.

PSS5 Newberry Library, 1984. 35pp.

PSS6 University of North Carolina at Chapel Hill. 40pp.

PSS7 Temple University, 1984. 116pp.

PSS8 University of Houston, 1981. 45pp.

PSS9 University of California, Santa Barbara, 1986. 53pp.

Public Services Research Reports

PSR1 University of Arizona. Assessing the Instructional Needs of Students in a Selected Scientific Discipline at the Univ. of Arizona. 1985. 140 pp.

PSR2 Cornell University. Appropriate Public Services for Agricultural Research Faculty Final Report. 1985. 54pp.

PSR3 Univ. of Illinois at Urbana-Champaign. Invisible User: User Needs Assessment for Public Services, Final Report. 1985. 68pp.

PSR4 Michigan State University. Non-Users of the MSU Libraries: An Assessment of Characteristics, Perceptions, and Needs at Michigan State University. 1985. 40pp.

PSR5 New York University. A Study of an Online Catalog from a Public Services Perspective, Final Report. 1985. 44pp.

PSR6 Pennsylvania State University. The Effect of An Instruction Program on Online Catalog Users, Final Report. 1985. 44pp.

PSR7 Preliminary Reports from Public Services Research Projects. 72pp. 1985.

PSR8 Texas A&M University. A Comparison of Two End User Operated Search Systems, Final Report. 1985. 54pp.

Management Review and Analysis Program Reports

MP20 Southern Illinois, April 1979. 93pp.
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